

Effective Knowledge Management: From Article Creation to Approval

1. Project Overview

Effective Knowledge Management (KM) is crucial for any organization that aims to streamline information sharing and ensure access to relevant knowledge for decision-making. This project focuses on designing, implementing, and validating a knowledge management solution that handles the entire lifecycle of knowledge articles—from creation to final approval—using ServiceNow as the core platform.

The solution leverages ServiceNow's KM capabilities to create, update, categorize, review, and approve articles systematically. The main goal is to improve knowledge accessibility, reduce the redundancy of information, and facilitate quicker resolution times by providing the right information at the right time.

2. Objectives

- **Streamline the Knowledge Article Process:** From creation to approval, automate and standardize workflows to ensure efficiency.
- **Enhance Accessibility:** Provide users with quick and easy access to validated and updated knowledge articles.
- **Improve Decision Making:** Equip employees and customers with reliable and timely information.
- **Minimize Redundancy:** Ensure that knowledge articles are accurate, relevant, and consolidated to reduce duplication.
- **Increase User Adoption:** Create an intuitive and user-friendly KM interface to encourage knowledge sharing and usage.

3. Key Features and Concepts Utilized

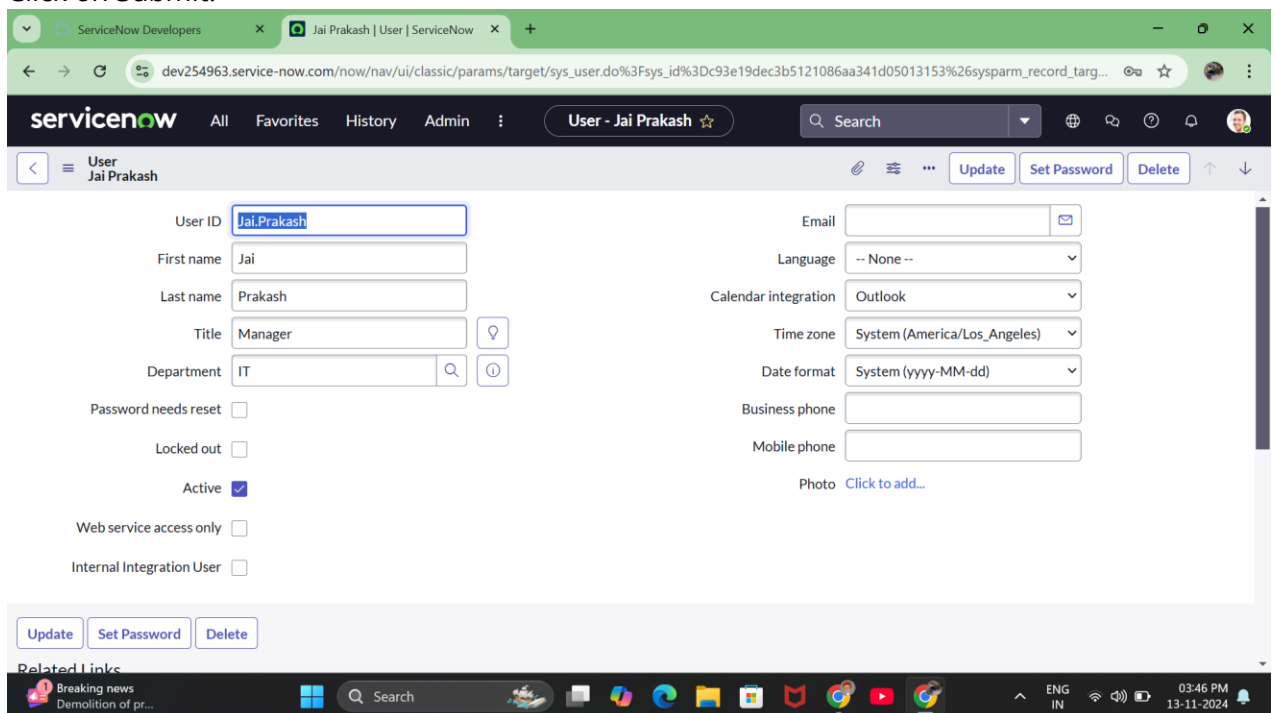
- **Knowledge Article Lifecycle Management:** Automated workflows to handle creation, review, and approval processes.
- **Role-based Access Control:** Define roles for authors, editors, reviewers, and approvers to control who can create, edit, and publish content.
- **Content Categorization and Tagging:** Use categories, tags, and metadata to organize content and improve searchability.

- **Search Optimization:** Implement advanced search features and filters to make finding relevant articles easier.
- **Notifications and Alerts:** Set up automated notifications to inform stakeholders about required actions (e.g., review requests, approvals).
- **Content Feedback and Analytics:** Collect user feedback on articles, and provide analytics to measure the usage, quality, and relevance of content.
- **Content Archival and Expiry:** Implement policies for archiving out-dated content and maintaining an updated knowledge base.
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4.Detailed Steps to Solution Desig

Activity-1 : Create Users.

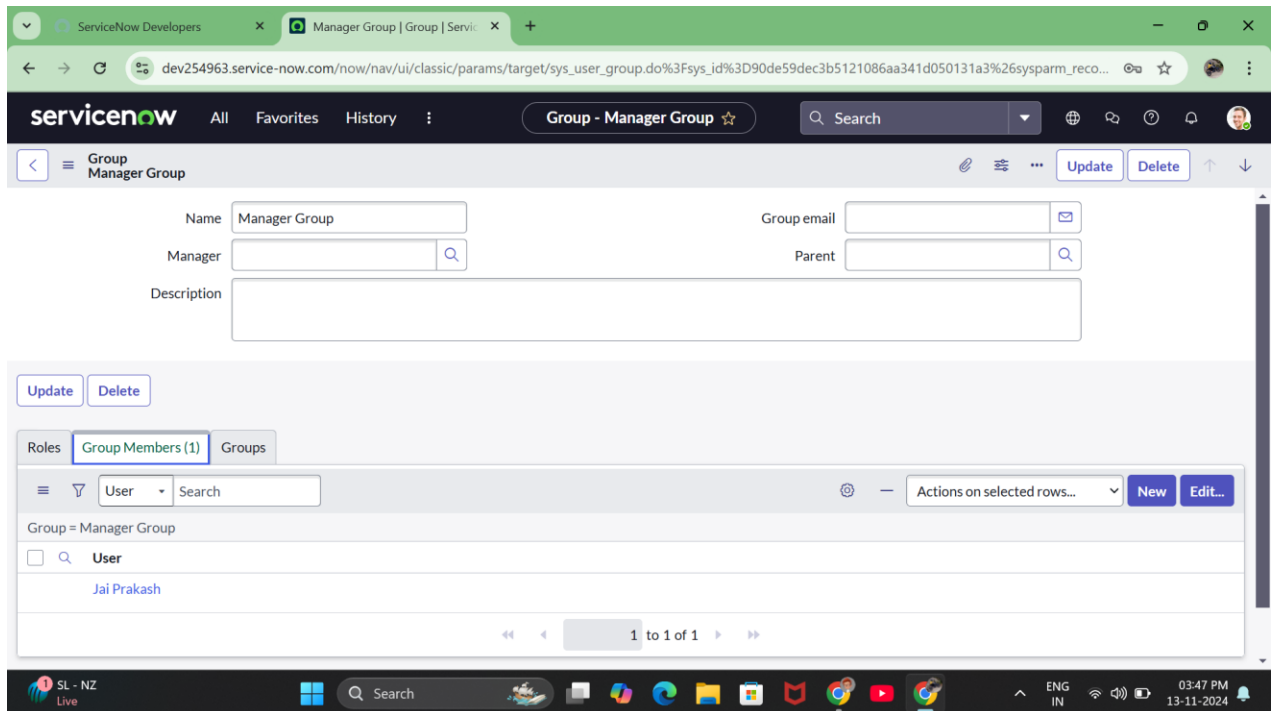
1. Open service now.
2. Click on All >> search for users
3. Select Users under system security
4. Click on new
5. Fill the following details to create a new user
6. Click on Submit.



The screenshot shows the ServiceNow 'User - Jai Prakash' form. The form is divided into two main sections: 'User Information' on the left and 'System Information' on the right. The 'User Information' section includes fields for User ID (Jai.Prakash), First name (Jai), Last name (Prakash), Title (Manager), and Department (IT). There are also checkboxes for 'Password needs reset', 'Locked out', 'Active' (checked), 'Web service access only', and 'Internal Integration User'. The 'System Information' section includes fields for Email, Language (set to -- None --), Calendar integration (set to Outlook), Time zone (set to System (America/Los_Angeles)), Date format (set to System (yyyy-MM-dd)), Business phone, and Mobile phone. At the bottom of the form, there are buttons for 'Update', 'Set Password', and 'Delete'. The ServiceNow interface also shows a search bar and navigation tabs at the top.

Activity - 2: Create Groups.

1. Open service now.
2. Click on All >> search for groups
3. Select groups under system security
4. Click on new
5. Fill the following details to create a new group.
6. Under Group Members, click on edit.
7. Add the user(Jai Prakash) to the Manager Group and click on Save.
8. Click on save.



The screenshot shows the ServiceNow interface for creating a new group. The browser address bar shows the URL: dev254963.service-now.com/now/nav/ui/classic/params/target/sys_user_group.do%3Fsys_id%3D90de59dec3b5121086aa341d050131a3%26sysparm_reco... The page title is "Group - Manager Group". The form fields are:

- Name: Manager Group
- Group email: (empty)
- Manager: (empty)
- Parent: (empty)
- Description: (empty)

Below the form, there are "Update" and "Delete" buttons. The "Roles" tab is selected, showing "Group Members (1)". The table below shows one member:

User
Jai Prakash

The table has a search bar and a "Search" button. The bottom of the page shows the Windows taskbar with the time 03:47 PM and date 13-11-2024.

Activity - 3: Create Roles.

1. Open service now.
2. Click on All >> search for roles
3. Select roles under system security
4. Click on new
5. Fill the following details to create a new role
6. Click on submit.

The screenshot shows the ServiceNow Role Manager interface. The browser address bar displays the URL: `dev254963.service-now.com/now/nav/ui/classic/params/target/sys_user_role.do%3Fsys_id%3D868f5152c3f5121086aa341d050131db%26sysparm_record...`. The page title is "Role - Manager". The "Name" field is set to "Manager" and the "Application" is set to "Global". The "Elevated privilege" checkbox is unchecked. The "Description" field is empty. Below the form, there are "Update" and "Delete" buttons. A "Related Links" section contains a link to "Run Point Scan". A tabbed interface shows "Contains Roles" as the active tab, with a search bar and "New" and "Edit..." buttons. The "Role = Manager" section shows a table with one row containing the word "Contains". The Windows taskbar at the bottom shows the date and time as 03:48 PM on 13-11-2024.

Activity - 4: Changing the Owner of the Knowledge Base.

1. Go to All >> Search for Knowledge Bases.
2. Open Knowledge bases and change the owner of IT from Bernard Laboy to Jai Prakash (To change Owner click on the Name and change it).

The screenshot shows the ServiceNow Knowledge Base - IT interface. The browser address bar displays the URL: `dev254963.service-now.com/now/nav/ui/classic/params/target/kb_knowledge_base.do%3Fsys_id%3Da7e8a78bff0221009b20ffffff17%26sysparm_recor...`. The page title is "Knowledge Base - IT". The "Title" field is set to "IT" and the "Application" is set to "Global". The "Owner" field is set to "Jai Prakash". The "Managers" field is empty. The "Publish workflow" is set to "Knowledge - Approval Publish" and the "Retire workflow" is set to "Knowledge - Approval Retire". The "Active" checkbox is checked. The "Description" field contains the text: "The ACME North America IT Service Desk Knowledge Base". The Windows taskbar at the bottom shows the date and time as 03:50 PM on 13-11-2024.

Activity - 5: Creation of Knowledge Article.

1.Go to All >> Search for my knowledge Articles.

2.Open my knowledge Articles >> Click New.

3.Fill the details as below:

Number :Auto-generated.

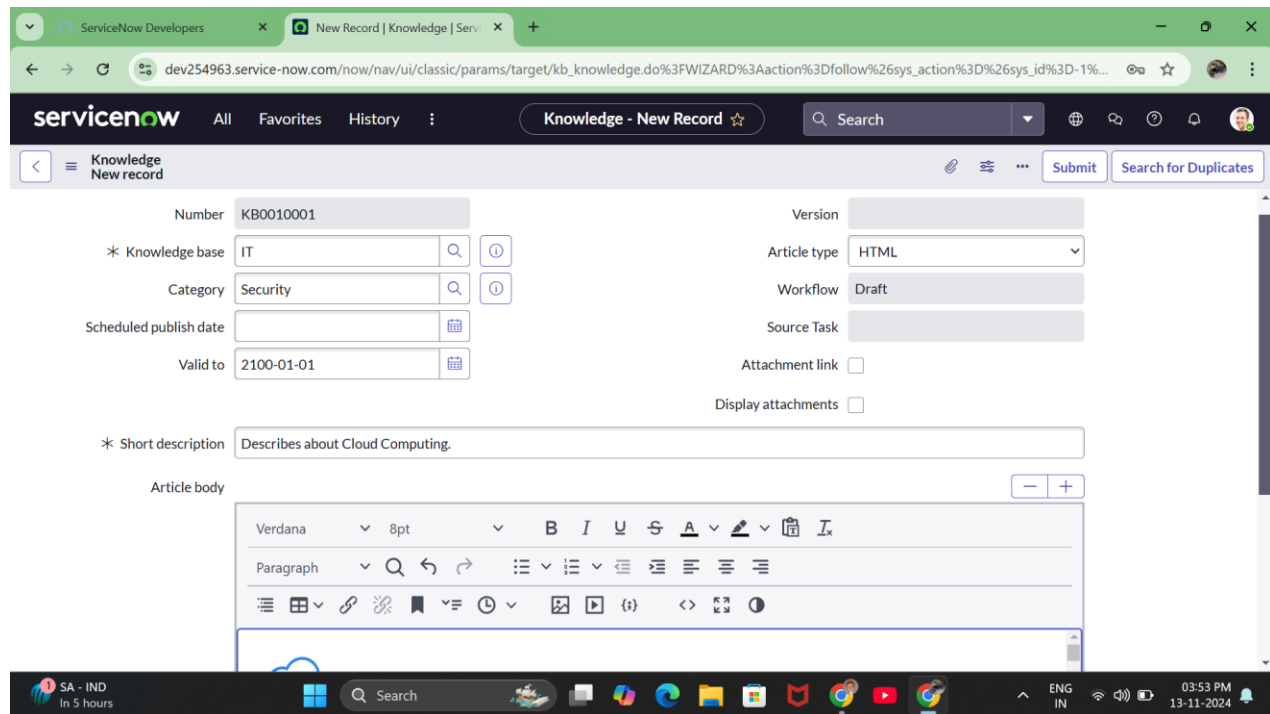
Knowledge base :IT

Category :Select any category

Short description :Describes about Cloud Computing. (Give Short description as per your requirement)

4.Click on Submit.

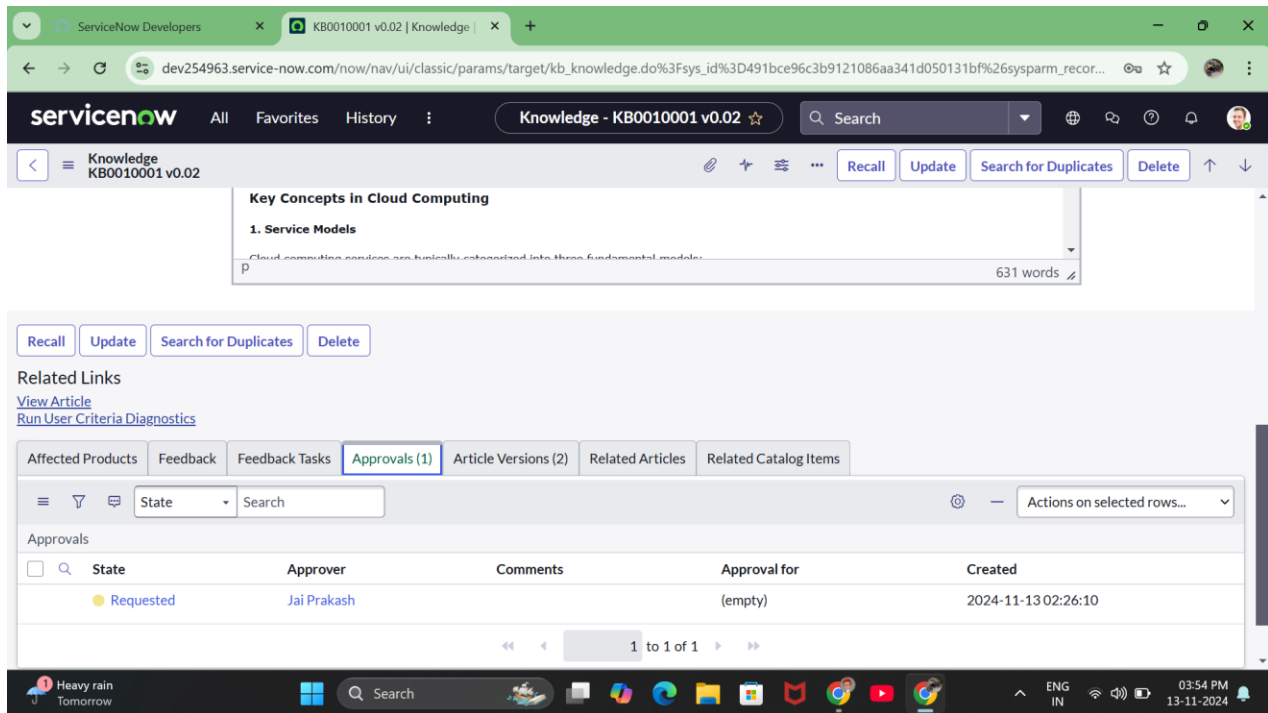
5.Click on Publish.



The screenshot shows the ServiceNow 'Knowledge - New Record' form. The form is titled 'Knowledge - New Record' and includes a search bar and a 'Submit' button. The form fields are as follows:

- Number:** KB0010001
- Knowledge base:** IT
- Category:** Security
- Scheduled publish date:** (empty)
- Valid to:** 2100-01-01
- Version:** (empty)
- Article type:** HTML
- Workflow:** Draft
- Source Task:** (empty)
- Attachment link:** (empty)
- Display attachments:** (empty)
- * Short description:** Describes about Cloud Computing.
- Article body:** (Rich text editor with a toolbar showing options like Verdana, 8pt, Bold, Italic, Underline, Strikethrough, Text color, Background color, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink, Insert link, Insert image, Insert video, Insert code, and Insert table.)

The bottom of the screenshot shows the Windows taskbar with the date and time: 03:53 PM, 13-11-2024.



The screenshot shows a ServiceNow Knowledge article titled "Key Concepts in Cloud Computing" with the sub-heading "1. Service Models". The article content is partially visible, mentioning "Cloud connection endpoints are typically categorized into three fundamental models:". The article has 631 words. Below the article content, there are buttons for "Recall", "Update", "Search for Duplicates", and "Delete". Under "Related Links", there are links for "View Article" and "Run User Criteria Diagnostics". The "Approvals" tab is active, showing a table with one approval request. The table has columns for "State", "Approver", "Comments", "Approval for", and "Created". The single entry shows a "Requested" state, approver "Jai Prakash", and a creation date of "2024-11-13 02:26:10".

State	Approver	Comments	Approval for	Created
Requested	Jai Prakash		(empty)	2024-11-13 02:26:10

5. Testing and Validation:

Unit Testing:

Unit Testing in the context of a Knowledge Management (KM) solution focuses on verifying that each individual component within the system operates as expected. Each feature or module is tested independently to ensure functionality before integrating them with the broader system.

User Interface Testing:

User Interface (UI) Testing focuses on ensuring that the KM system is user-friendly, visually consistent, and behaves as expected when interacting with different elements. The goal is to validate that the end-user experience is smooth and intuitive.

6. Key Scenarios Addressed by ServiceNow in the Implementation Project:

Knowledge Article Creation: Users can submit new articles using pre-defined templates. Each article follows a specific workflow from draft to submission.

Review and Approval Workflow: Articles are routed to reviewers and approvers based on pre-defined workflows. Automated notifications remind stakeholders of pending actions.

Content Update and Version Control: Authors can update existing articles. A version history is maintained to track changes over time.

Search and Access: Users can quickly find articles through optimized search tools. Access is restricted based on user roles and permissions.

Feedback and Rating: Users can provide feedback on articles, helping authors and editors to keep content relevant and accurate.

Archival and Expiry Management: Outdated content is archived based on pre-defined rules, ensuring the knowledge base is up-to-date.

7. Conclusion

Implementing an effective knowledge management solution within ServiceNow can significantly improve the overall efficiency of information handling in an organization. By automating the lifecycle of knowledge articles, from creation to approval, the solution ensures that relevant, accurate, and updated information is readily accessible. This results in improved decision-making, better customer support, and more effective internal communication. Continuous monitoring, feedback, and content updates will be essential for sustaining the quality and relevance of the knowledge base. The successful implementation of this project can serve as a blueprint for other areas of information management and digital transformation efforts.

